# Compass MED D - EGWP Opt Hold Release Process in FAZAL

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**Description:** This document assists the CCR when receiving from potential enrollees that have been receiving benefits through an Employer Group Waiver Plan (EGWP).

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| General Information |

**Notes:**

* Health Plans/EGWP - refer to the CIF to determine if the plan handles the situations outlined in this document.
  + If Client handles, follow direction provided in CIF.
* For all other non-SSI (x9110) clients - refer to [Compass - Transferring Calls to Dedicated and Designated Client Teams.](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4c87518d-83f5-4884-8631-1f427b77da7d)
* SilverScript x9110 CCRs, follow the process outlined in this document.

MED D Customer Care Representatives (CCRs) may receive calls from potential enrollees that have been receiving benefits through an Employer Group Waiver Plan (**EGWP**). These benefits typically would include medical, prescription, dental and vision coverage for active employees and/or retirees. Due to rising cost, many employers and union groups are making changes in the coverage they offer to retirees.

Once retirees become Medicare eligible, employers and union groups may make one of three decisions for their retirees**:**

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| **Option** | **Then** |
| Continue providing the retirees with full benefits. | * This is considered **creditable coverage** by CMS. * The retiree would not need to choose a Medicare PDP, as they can only be enrolled into one creditable coverage plan at a time. |
| Drop all benefits for retirees. | * The retiree will be granted a Special Enrollment Period (**SEP)** by CMS to choose their own Medicare coverage. |
| Allow the retirees the option to keep their medical, dental, and/or vision benefits, if they join a **specifically selected** Medicare standalone PDP. | * The retiree will be given a **21-day** Opt-Out period to advise SilverScript to continue processing the enrollment into the Medicare PDP selected by the employer or union group or decline the enrollment. * The retiree will receive notification of the 21-day Opt-Out period no later than 10 calendar days from the date their application was received. * The Opt-Out period expires 21 days after the date on the Opt Out letter. |

 If the Opt Hold Release Date has passed or the plan has become effective, the beneficiary **may not** Opt Out of the EGWP.

* If the beneficiary does not want to participate in the plan, the beneficiary will have to disenroll from the plan.

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| Authorized to Attest |

Only the beneficiary, legal representative or SHIP Counselor can verbally attest. The CCR will use the below to determine if the caller is authorized to provide attestation:

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| **If the caller is…** | **Then…** |
| Legal representative | In order to process this attestation for (Beneficiary’s Name), I need to verify that you are authorized to act on their behalf under the laws of the State for which resides. If asked to provide evidence of that authority to Medicare, would you be able to do so?  Refer to [MED D - Obtaining a Verbal Attestation from an Authorized Representative](https://aetnao365.sharepoint.com/sites/PolarisPHDDocumentationReview/Shared%20Documents/General/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/Documents/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/40ZZSJWS/TSRC-PROD-024341). |
| Non-authorized party (helping the beneficiary but is not the legal representative) | * Only the beneficiary or legal representative or SHIP Counselor is able to verbally attest. * You can assist the beneficiary completing the attestation form and mailing to:   **SilverScript**  **P.O. Box 30001**  **Pittsburgh, PA 15222-0330**  **OR fax to: SilverScript Bizfax at 866-552-6205**  **Note:** The CCR must put add detailed alert in Compass **Medicare D Landing Page** that the non-authorized party is aware of the verbal attestation process. |

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| Releasing an Application on Opt Hold in FAZAL |

To release an enrollment application on Opt Hold in FAZAL, the CCR will**:**

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| **Step** | **Action** | | |
| **1** | Access the **Search by** **Medicare D** tab and search by the beneficiary using the following information:   * Member Name * Date of Birth * MBI * ID number from opt hold letter (If available) | | |
| **If…** | | **Then…** |
| The beneficiary’s account is located | | Proceed to **Step 2.** |
| The beneficiary’s account is **not** located | | After exhausting all Search Parameters, refer to [Compass MED D - SilverScript - Resolution of Eligibility](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3498d644-ecdb-4bb5-8b04-fe1a1fbd7ee5). |
| **2** | Confirm **Record Stages** indicates **Opt Hold**. | | |
| **3** | Determine whether the **Opt Hold Release Date** has passed by**:**   * Asking the beneficiary to provide the date on their Opt Hold letter. * View a copy of the beneficiary’s Opt Hold letter by clicking the “**Last 12 Months of Communications**” hyperlink in the **Medicare D Quick Actions** panel, locatedwithinthe **Medicare D Landing Page** in Compass.   + Refer to [Compass MED D - Viewing Correspondence and Requesting Reprints.](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6bce8cc8-2318-4271-85a3-07198190a18c) | | |
| **If the letter states that the beneficiary…** | | **Then…** |
| Needs to provide additional information to opt in/enroll | | * Access the [Compass MED D - Incomplete Enrollments (ICE) or Enrollments with Missing Information](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c31eec52-fb25-4867-9693-4b5129d67190) work instruction and proceed accordingly. * Once the information has been provided, proceed to the next step if the beneficiary wants to opt in. |
| Needs to opt in/opt out | | Proceed to the next step. |
| **4** | Confirm the beneficiary’s decision regarding their application. | | |
| **If the beneficiary…** | **Then…** | |
| Wants to enroll | Submit the following **Support Task:**  **Task Type:** Enrollment – Opt Hold/Group Attestation  **Task Data:**Complete all Required Fields marked with an asterisk (\*).  For Assistance refer to [Compass - Create a Support Task](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6). | |
| Does **NOT** want to enroll | **If the beneficiary calls…** | **Then…** |
| **Past the Opt Out date but PRIOR** to the effective date of enrollment | Submit the following **Support Task:**  **Task Type:** Enrollment - Cancellation of Enrollment  **Task Data:**Complete all Required Fields marked with an asterisk (\*).   * MBI/HICN * State * Medicare D Contract ID: S5601 (SilverScript) or S2893 (NEJE) * Verbal Attestation: Yes * PBP ID: If unavailable, use “000” * Complete additional fields that provide missing information for the application   For Assistance refer to [Compass - Create a Support Task](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6).  **Task Notes:**  The beneficiary is past the Opt-Out date for withdrawing their enrollment and are requesting to cancel their enrollment prior to the effective date. The beneficiary can be reached at <phone number>. |
| **AFTER** the effective date of enrollment | Advise the caller that they will need to submit a disenrollment request.  **Note:** Access the **Eligibility** section of the CIF.  CCRs must follow the Opt Out/Disenrollment process provided by the client.   * This may include referring to [Compass MED D - Voluntary Disenrollment](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8888d347-7357-4b2f-ac03-9c65d30b430e) or referring all calls directly to the client. |

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| Resolution Time |

Releasing an Opt Hold = 4 business days

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| Related Documents |

**Parent SOP:** CALL-0048**:** [Medicare Part D Customer Care Call Center Requirements-CVS Caremark Part D Services, L.L.C.](https://policy.corp.cvscaremark.com/pnp/faces/SecureDocRenderer?documentId=CALL-0048&uid=pnpdev1)

**Abbreviations/Definitions:** [Abbreviations / Definitions](https://aetnao365.sharepoint.com/sites/PolarisPHDDocumentationReview/Shared%20Documents/General/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/Documents/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/40ZZSJWS/CMS-2-017428)

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